

Insurance - non VetXML

01/08/2025 1:59 pm BST

Summary

Merlin has the ability to mark clinical items as insurance. Users are then able to print or email these directly from Merlin. If your practice uses VetXML for sending the insurance claims, further details can be found [here](#).

Insurance Details

In the patients details screen there is a place to add the patients insurance details. This information will show on any documents that have the relevant [merge field](#). You can edit this page by using the 'Modify' button.

Patient

+ Add Save Patient Modify Deactivate Patient Clipper Treatment Lab Request Make Appointment Transfer Patient

Patient Details Notes Reminders Lab Result Weight Chart Reminder Letters Referral Practice First Opinion Practice

Patient

Patient Category * Small Animal Last Visit 11/07/2025 Yard Name

Name * Morris Registered 11/04/2025 Yard Town

ID 1266592 Date Of Birth * 11/04/2020 Enter Age Yard Postcode

Species * Canine Age 5 Years 3 Months 21 Days old Additional Name 1

Breed * Cross Breed (Miscellaneous) Weight 10.6 Kg Additional Name 2

Colour Deceased Additional Name 3

Gender Neut Male **Insurance Plan Pet Plan** Additional Name 4

Preferred Surgeon Policy No 123456 ☐ Passport Certified

Microchip No Policy Start 03/08/2021 Intended for food chain

☐ Cross Breed ☐ Imported Animal Case No Discount Category

Anti Parasitics

Flea Prevention Frontline

Last Flea 11/07/2025

Last Wormed 11/07/2025

Other Information

Loyalty Card

Issued On

Usage

Height

Int. Stable

☐ Sold/Re-homed on

Conditions

On Atopica for skin

Creating a Insurance Claim

1. Search for the [client and patient](#) in Reception.
2. Navigate to the [History](#) screen.
3. Tick the Insurance box for the treatments required.

Treatment

Activities

Administration

Payments

Referral

Print History

Barcode

Clinical

Doc Mgmt

Make Appt

Account

Weight

Consent

View PACS

Refresh

Patient Lab

Patient Details

Send To

History

Pre-Invoice

Add Treatment

Prescriptions

Saved Estimates

Documents

Patients

Client Notes

Archive

Health Care Plan

Filters:

Description

Clinical Code

All

Treatment Type

All

Show

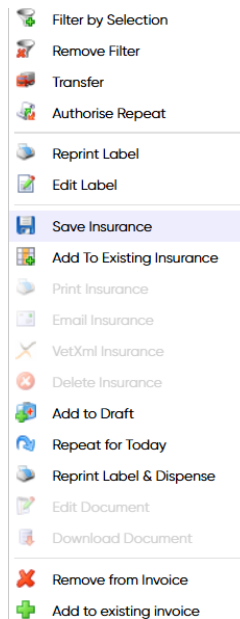
All

Reset

Settings

	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insurance
Date: 11/07/2025									
	11/07/2025	13:54	History - Sent to Hospital list	General	1	0.00		Esher	<input type="checkbox"/>
	11/07/2025	14:31	Consultation Consultation - Nurse	General	1	22.05	Sharon Holland	Esher	<input type="checkbox"/>
	11/07/2025	15:59	Tablet Metacam Oral Susp 10ml Dog (Give 0 ml 0 times a day for 0 days -- 123456 Expires: 29/12/2024 -- DO NOT GIVE ON AN EMPTY STOMACH)	General	1	14.15	Sharon Holland	Esher	<input type="checkbox"/>
	11/07/2025	15:59	NEXGARD CHEW TAB LGE DOG 10-25KG 3 PK (Dose according to weight -- 12364888 Expires: 13/01/2026)	General	1	20.86	Sharon Holland	Esher	<input type="checkbox"/>
TOTAL(Excluding Discounts)						57.06			
Date: 15/07/2025									
	15/07/2025	12:47	Document Created - GA consent form.docx	General	1	0.00	Jamie Smith	Esher	<input type="checkbox"/>
TOTAL(Excluding Discounts)						0.00			

4. Right click and select 'Save Insurance' or 'Add To Existing Insurance'



5. This will give the claim a unique number for that patient's treatment.

Treatment

Activities

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Consent

View PACS

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Patient Lab

Patient Details

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Add Treatment

Prescriptions

Saved Estimates

Documents

Patients

Client Notes

Archive

Health Care Plan

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Description

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All

Treatment Type

All

Show

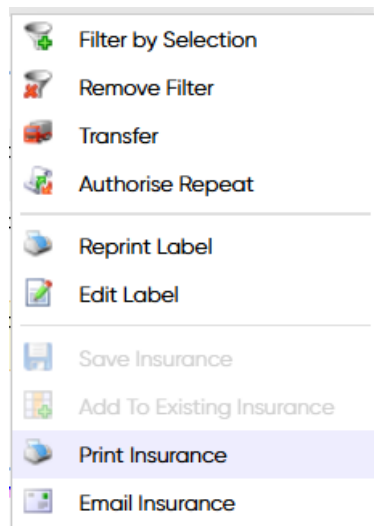
All

Reset

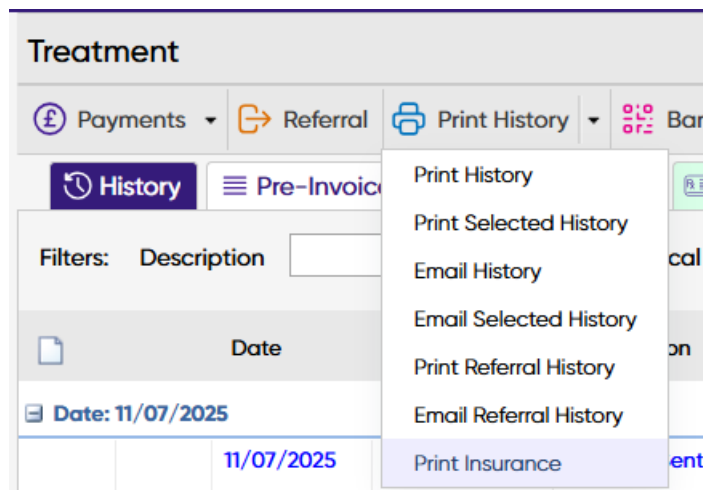
Settings

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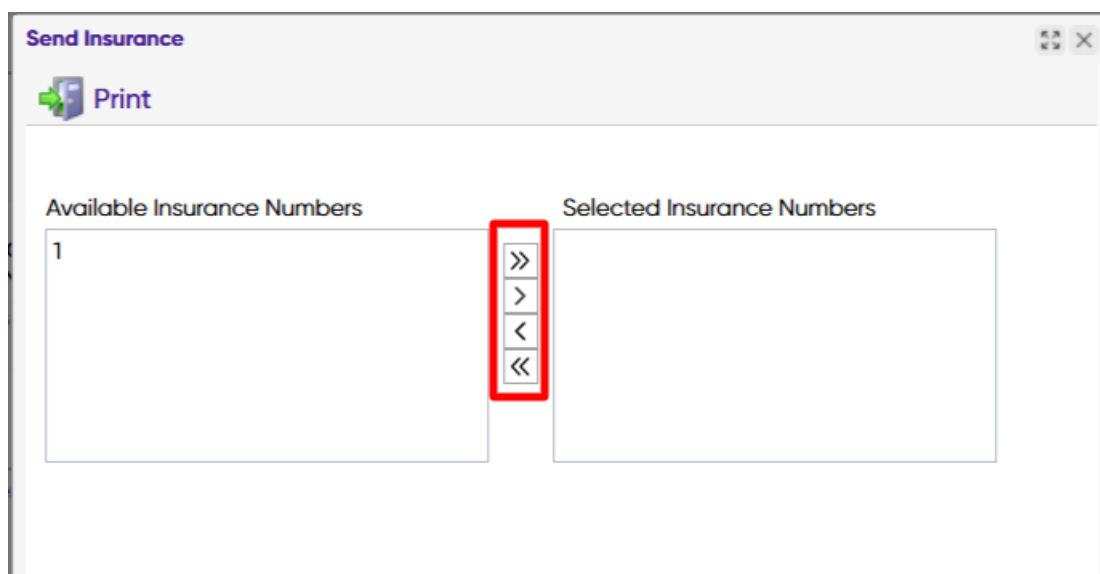
6. Right clicking again will give you the ability to either 'Print Insurance' or 'Email Insurance'. You are also able to either delete single or multiple rows if needed.



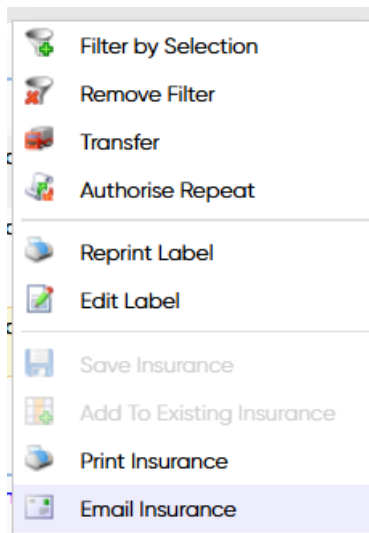
7. To print the insurance, the first way is to right click and 'Print Insurance', this will generate as a PDF that can be printed.
8. The second way to print insurance is to go to the 'Print History' button and select 'Print Insurance'



9. From here you can then select the available number/s of insurance you wish to print and using the arrows move these over to the right hand side. This then can be generated as a PDF that can be printed or saved.



10. To email from this screen, right click and select 'Email Insurance'



11. The following box will generate, allowing you to add the email address and write the body of the email. The insurance document will be added as an attachment and can be viewed before sending.

Merlin Email Client

To:

Cc:

Subject: Notice From MWI Vets

B I U Paragraph sans-serif 12pt

Attachments: **insurance.pdf** View

Communication Type: Contractual Send Email Insert Image Insert File Cancel

12. Once ready, send the email. Details of the email sent will be visible within the Communication tab within the client record.